U.S. Bankruptcy Court
Western District of
Wisconsin

CM/ECF Filing Guide for Limited Use Participants

(Revised September 3, 2002)

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Filing Documents		
Document:	**Select:**	**Notes:**
Reaffirmation Agreement	**Bankruptcy > Creditor Claim Actions > Reaffirmation Agreement** **OR** **Bankruptcy > Creditor Claim Actions > Reaffirmation Agreement with atty declaration**	• When prompted to select any additional attorneys, click *Next*. Do not select any additional attorneys. • Select the party from the list. If the party is not listed, click the *Add/Create New Party* button and add party information. (Refer to **Add Party to Case** instructions in this guide.) • Select the PDF file. (Refer to **Select the PDF Document** instructions in this guide.) • Enter name of creditor in text box.

Creditor's Request for Notice	**Bankruptcy > Creditor Claim Actions > Creditor Request for Notices**	• When prompted to select any additional attorneys, click *Next*. Do not select any additional attorneys. • Select the party from the list. If the party is not listed, click the *Add/Create New Party* button and add party information. (Refer to **Add Party to Case** instructions in this guide.) • Select the PDF file. (Refer to **Select the PDF Document** instructions in this guide.) • After completing this entry, remember to add party to creditor mailing matrix [**Bankruptcy > Creditor Maintenance > Enter individual creditors**]. (Refer to **Add Creditor to Creditor Mailing Matrix** instructions in this guide.)
Creditor's Request for Notice (batch)	Bankruptcy > Batch Filings (enter case number(s)) > **Creditor Request for Notices (batch)**	• Select the PDF file. (Refer to **Select the PDF Document** instructions in this guide.) • After completing this entry, remember to add party to creditor mailing matrix [**Bankruptcy > Creditor Maintenance > Enter individual creditors**]. (Refer to **Add Creditor to Creditor Mailing Matrix** instructions in this guide.)

File Claim	**Bankruptcy > File Claims**	• On *Search for Creditor* screen, enter case number and name of creditor for whom the proof of claim is being filed; leave type as *All creditors*; click *Next*.
		• If creditor appears on screen, select creditor and click *Next*; if creditor does not appear, click the *Add Creditor* link which allows you to add the creditor. After adding the creditor, click the *File A Proof Of Claim* link. (Refer to **Add Creditor to Creditor Matrix** instructions in this guide.)
		• On the *Proof of Claim Information Screen*, enter the following:
		  • Amends Claim # (if applicable)
		  • Duplicates Claim # (if applicable)
		  • Filed By: (select attorney or creditor)
		  • Late (select Yes or No)
		  • Amount Claimed (Do not enter the “$” or commas)
		  • Description (if necessary)
		  • Remarks (if necessary)
		• Select the PDF file. (Refer to **Select the PDF Document** instructions in this guide.)

Withdrawal of Claim	**Bankruptcy > Claim Actions > Expungement/Withdrawal of Claim**	• When prompted to select any additional attorneys, click *Next*. Do not select any additional attorneys. • Select the party from the list. If the party is not listed, click the *Add/Create New Party* button and add party information. (Refer to **Add Party to Case** instructions in this guide.) • Select the PDF file. (Refer to **Select the PDF Document** instructions in this guide.) • Enter Claim # when prompted. • Add name of creditor in text box.
Letter Satisfying Claim	**Bankruptcy > Claim Actions > Letter Satisfying Claim**	• When prompted to select any additional attorneys, click *Next*. Do not select any additional attorneys. • Select the party from the list. If the party is not listed, click the *Add/Create New Party* button and add party information. (Refer to **Add Party to Case** instructions in this guide.) • Select the PDF file. (Refer to Select the PDF Document instructions in this guide). • Enter Claim # when prompted. • Add name of creditor in text box.

Assign/Transfer Claim	**Bankruptcy > Claim Actions > Assignment/Transfer of Claim**	• When prompted to select any additional attorneys, click *Next*. Do not select any additional attorneys. • Select the party from the list. If the party is not listed, click the *Add/Create New Party* button and add party information. (Refer to **Add Party to Case** instructions in this guide.) • Select the PDF file. (Refer to **Select the PDF Document** instructions in this guide.) • Select appropriate radio button (type of transfer). • Enter Transferred To: • Enter Transferred From: • Enter Claim Number: • Enter Claim Amount:

Notice of Assignment/Transfer of Claim	**Bankruptcy > Claim Actions > Notice of Assignment/Transfer of Claim**	• When prompted to select any additional attorneys, click *Next*. Do not select any additional attorneys. • Select the party from the list. If the party is not listed, click the *Add/Create New Party* button and add party information. (Refer to **Add Party to Case** instructions in this guide.) • Select the PDF file. (Refer to **Select the PDF Document** instructions in this guide.) • Enter Last Day to File Objections/Request for Hearing. • Refer to Assignment/Transfer of Claim.(Category is "claims")
Add Creditor to Creditor Mailing Matrix	**Bankruptcy > Creditor Maintenance** > Enter individual creditors **OR** When filing a Proof of Claim, click on the *Add Creditor* link.	• On the *Add Creditor(s)* screen, enter the creditor's name and address. When completed, click on *Last Entry*. Click *Next* then *Submit*.
Corrective Entry	**Bankruptcy > Creditor Claim Actions > Corrective Entry**	• Refer to document filed in error (Category will be "claims" or "crmisc") • Enter brief explanation of error in text box • Re-file the pleading

Utilities/Reports		
Document:	**Select:**	**Notes:**
Change Password	**Utilities > Maintain Your ECF Account**	• Scroll down to bottom of screen and click on *More user information*. After changing your password, click on *Return to Account Screen* then scroll down to bottom of screen and click *Submit* to have any changes recorded.
Change Email information	**Utilities > Maintain Your ECF Account**	• Scroll down to bottom of screen and click on *Email information*. After changing your e-mail settings, click on *Return to Account Screen* then scroll down to bottom of screen and click *Submit* to have any changes recorded.
View Your Transaction Log	**Utilities > View Your Transaction Log**	• Enter start date and end date.
Claims Register	**Reports > Claims Register**	• Log into system using. • PACER Login and Password. • Enter case number. • Click *Run Report*.

Help	
Screen:	**Instructions for Attorney’s and Creditor Representatives**:
Select additional attorney(s)	When prompted to select any additional attorneys, click *Next*. Do not select any additional attorneys.
Select the Party	Select the party from the list. If the party is not listed, select the *Add/Create New Party* button and add party information. Refer to **Add Party to Case** instructions in this guide for instructions on how to add party to case.

Add Party to Case	1. Search for the party. a. Begin by searching to see whether the party is already in the database. b. To search, enter the party's Social Security number or Tax ID, or all or part of the last or business name, and click the *Search* button. 2. Select a party already in the database or add a new one. a. If the party is already in the database, highlight the name on the party list, and click the *Select name from list* button. b. To add a new party to the database, click the *Create new party* button. In either instance, the *Party Information* screen will be displayed. 3. Enter the information about the party. a. For a party already in the database, fill in the party role and pro se fields, and enter party text if needed. (Party text appears after the party's name on the cover sheet of the docket, e.g., ABC Corporation, a subsidiary of XYZ International.) b. To change address information just for this case for a party already in the database, type over the existing address information. c. For a new party, fill in the name, address, party role, and pro se fields, and enter party text if needed. 4. Click *Submit* only after all attorneys and aliases have been added. a. If the case being opened is a joint petition, the search screen will be displayed for the joint debtor, with a check box to copy the first debtor's address information. b. If the case being opened is an adversary proceeding, or if a party is being added after the case has been opened, the search screen will be displayed for the next party. When the last party has been added, click the *End party selection* button.

Select the PDF document	Type in the file name of the PDF document containing the pleading you are filing; or click on the *Browse* button to search your network and select from those files. Remember to change the file type to Acrobat (*.pdf). 5. If your filing does not have attachments, click *next* to continue. 6. If your filing has attachment(s) (*e.g.*, financing papers, exhibits, etc.), click *Yes* for "Attachments to Document." Click *Next* to see the attachments screen. 1. Enter the PDF document that contains the attachment. Type in the file name of the PDF document containing the attachment you are filing; or click on the *Browse* button to search your network and select from those files. Remember to change the file type to Acrobat (*.pdf). If your filing has more attachments, first continue labeling this attachment following the instructions below. 2. At your option, select a document type and/or enter a description. If you press the down arrow to the right of the *Type* box, you see a list of available attachment types. Select the one you want by highlighting it. Description: Type a short description of your attachment. 3. Add the filename to the list box below. Add the attachment you have entered to this list by clicking the *Add to List* button. If you have made a mistake, highlight the mistaken attachment and click the *Remove from List* button. If you have more attachments, go back to Step 1. Continue until all your attachments are on this list.

Does this refer to an existing document?	Check the box if you would like to relate this event to an earlier event in this case. Two more screens will display after you click *next*: • *Please select the category...*: A list of event categories is displayed. Select one or more categories from the list by highlighting the ones you need and clicking *Next*. A list of all the docket entries in those categories is shown. • *Include*: Check the box for each docket entry that should relate to the current filing. Click *Next*.
Notice of Electronic Filing	The Notice of Electronic Filing is the verification that the filing has been sent electronically to the Court's database. It certifies that this is now an official court document. • Clicking on the case number hyperlink will present the docket report for this case. Note that you will be prompted for your PACER login and password. • Clicking on the document number hyperlink will present the PDF image of the document just filed. Clicking on the document number here will allow you to view the filed document once without charge. Subsequent access to any Query or Report programs must go through the PACER system. Users must be registered with the PACER system to have a login and password. • Scroll down to see participants who have or have not registered for electronic noticing on this case. • To print a copy of this notice, click the browser *Print* icon. • To save a copy of this notice, click *File* on the browser menu bar and select *Save Frame As*.